



## Chapter 3 - Checkout and Checkin

### *Checkout*

Regular circulation: circulation of items in the regular collection.

Pre-cataloged circulation: circulation of items that have a barcode but have not yet been cataloged. These items may be checked out and then sent to cataloging when returned.

Non-cataloged circulation: circulation of items that are not in the catalog and do not have a barcode.

Record In-House Use: circulation of items that may be checked out by patrons but do not leave the library.

- 1) To check items out to a patron, begin by accessing the *Circulation* menu and selecting *Check-Out*.

- 2) Using your mouse, place the cursor in the light green “Enter Barcode” box and scan the patron’s library card barcode.
- 3) Although all patron’s must have their library card with them to check out materials, you can also retrieve a patron by searching the patron database. You can select “Search” and “Search for Patron” to obtain the patron record.

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The screenshot shows a web browser window with the address bar displaying '1: mgrl-ma-demo-globaladmin@PIED-AUB-isl.demo.gapines.org'. The browser has a menu bar with 'File', 'Edit', 'Search', 'Circulation', and 'Cataloging'. The main content area is titled 'No Patron Selected' and contains a 'Search for Patron' form. The form includes a checkbox for 'Include inactive patrons?', a dropdown menu for 'Limit results to patrons in' set to 'Everywhere', and input fields for 'Last Name', 'First Name', 'Middle Name', 'Email', 'Phone', 'ID', 'Address 1', 'Address 2', 'City', and 'ZIP'. There are 'Search' and 'Clear Form' buttons at the bottom of the form. A 'Retrieve Patron' button is located in the top right corner of the search area.

- 4) Highlight the desired patron and choose Retrieve Patron. After the patron is retrieved, the check out screen will appear. Any staff alerts about this patron will also appear at this time.

The screenshot shows the '2 Patron Search' results page. The patron 'BORGER, SHAUNA' is highlighted in a blue row. The table has columns: 'Barred', 'Date of Birth', 'Last Name', 'First Name', 'Middle Name', and 'Library Card: Barcode'. The highlighted row shows '7/31/83 12:00 AM', 'BORGER', 'SHAUNA', and '8592417'. To the left of the table is a sidebar with detailed information about the patron, including status, holds, bills, and contact information. The sidebar is titled 'BORGER, SHAUNA' and includes links for 'Merge Patrons', 'Search Form', and 'Retrieve Patron'. The sidebar also has links for 'Maximum Bills', 'Has Bills', and 'Has Overdues'. The sidebar content includes: Status (Resident, BR2, Internet Filtered, Expires on 8/25/13), Holds (1), Available (0), Bills (\$10.00), Check Outs (4), Overdue (2), Long Overdue (0), Claimed Returned (0), Lost (0), Non Cataloged (0), ID and Contact Information (Library Card: 8592417, ID 1: Drivers License, ID 2: Holds Alias, Date of Birth: 7/31/83, Day Phone, Evening Phone, Other Phone, OPAC Login: 8592417, Email), Mailing Address (1129 CAVENDISH DR, CARMEL IN 46032), and Physical Address (1129 CAVENDISH DR, CARMEL IN 46032). There are '(Copy/Print)' links for the mailing and physical addresses. At the bottom of the sidebar are 'Save Columns', 'Copy to Clipboard', and 'Print' buttons.

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- 5) The left pane gives an overview of the patrons account. This will include any Bills, overdue books, etc.

The screenshot displays a web application interface for managing a patron's account. The browser address bar shows the URL: `1: mgr1 ma demo globaladmin@PIED-AUB-isl.demo.gapines.org`. The page title is "Patron: Smith, Jeremiah".

The interface is divided into two main panes. The left pane, titled "▼Status", provides an overview of the patron's account for "Smith, Jeremiah". It includes the following information:

- Patrons:** HCLS-FV, Internet: Filtered, Expires on 2011-03-27
- Holds:** 1
- Available:** 0
- Bills:** \$5.00
- Check Outs:** 2
- Overdue:** 1
- Long Overdue:** 0
- Claimed Returned:** 0
- Lost:** 0
- Non Cat:** 0

The right pane, titled "Check Out", is used for checking out items. It features a "Barcode:" input field, a "Submit" button, and a "Due Date" dropdown menu set to "Normal". Below the input fields, there is a table with columns for "Barcode", "Due Date", and "Title".

At the bottom of the interface, there are several buttons: "Print Receipt", "Export", "Copy to Clipboard", "Save Columns", "Strict Barcode" (checkbox), "Auto-Print" (checkbox), and "Done".

- 6) To begin checking items out, place the cursor in the green "Barcode:" box and begin scanning items.
- a. Items will begin to appear in the right pane as they are checked out.

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The screenshot shows a web-based interface for managing library circulation. The top navigation bar includes links for File, Edit, Search, Circulation, and Cataloging. The main content area is divided into two panels. The left panel, titled "Status", displays information for a patron named "Smith, Jeremiah" (HCLC-FV). It shows a list of holds (1), bills (\$5.00), check outs (3), and overdue items (1). The right panel, titled "Check Out", contains a form for entering item information. The form includes fields for Barcode (123456), Due Date (2008-09-11), and Title (Went on a great adventure :). Below the form are buttons for "Print Receipt", "Export", "Copy to Clipboard", "Save Columns", "Auto-Print", and "Done".

1: mgrl-ma-demo-globaladmin@PIED-AUB-ist.demo.gapines.org

File Edit Search Circulation Cataloging Admin (-) Help

1 Patron: Smith, Jeremiah

**Smith, Jeremiah** (Has Bills) (Has Overdues)

**▼Status**

Patrons  
HCLC-FV  
Internet: Filtered  
Expires on 2011-03-27

Holds: 1  
Available: 0

Bills: \$5.00  
Check Outs: 3  
Overdue: 1  
Long Overdue: 0  
Claimed Returned: 0  
Lost: 0  
Non Cat: 0

**▼ID/Contact Info**

Library Card: 123456  
ID 1: Drivers License  
xxxx5777  
ID 2:  
DOB: 1983-01-01

Day Phone:  
Evening Phone:  
Other Phone:

OPAC Login: 123456  
Email:

**▼Mailing Address**

1 University Way  
Tuscaloosa AL 35401

**Check Out**

Barcode: 123456 Due Date: 2008-09-11 Title: Went on a great adventure :  
Submit

Print Receipt Export Copy to Clipboard Save Columns ☐ Strict Barcode ☐ Auto-Print Done

7) After you are finished checking out items, click "Print Receipt" followed by "done" or select "Auto-Print" and click "done".

## Pre-cataloged Items

Pre-cat items are those items that have not be added to the database or interlibrary loans from non-Evergreen libraries.

### Checking out pre-cataloged items from the check out screen:

- 1) Scan the item barcode.
- 2) An alert will appear stating: *Mis-scan or non-cataloged item.*
- 3) To continue with check out, click Pre-cataloged.
- 4) Enter title and author information and click Checkout.
  1. When checking out an ILL from a non-Evergreen Indiana library, edit the item's title when entering the pre-cat record to include "ILL-No Renewals" as part of the title.

- 5) Item is added to the list of Check Outs

## Non-cataloged Items

Non-cataloged items may be more familiar as *Ephemeral* items – they are those items that libraries do not wish to catalog, but do wish to track for circulation statistics.

These items are checked out with a due date but when the due date expires, the items disappear from the patron's record.

No fines accrue on non-cataloged items but circulation statistics are collected.

## Checking Out Non-cataloged Items from the Check Out screen

1. Click Check Out button or hit **F1** to access *Retrieve Patron by Barcode*.
2. Scan patron barcode.
3. The Patron Account opens to Check Out function tab.
4. Click on Barcode to open the non-cataloged items selection list.
5. Click the type of item, such as Paperback Book; the box for the barcode will become grayed out and labeled *Non-cataloged*.
6. Click Submit.
7. In the pop-up, enter the number of items being checked out.
8. Click OK.
9. The items are added to the Check Out list with a normal due date.
  1. Non-cataloged items do not appear in the list of items out unless you select that option in the column picker.
10. Click OK.

## In-house Use (F6)

May be used to record in-house use for both cataloged and non-cataloged items. Example: Computer usage

1. Select Circulation → Record-In House Use
2. Cataloged items: Enter item barcode. When recording more than one use of an item, edit the number in the # of uses box.
3. Non-cataloged items: choose the appropriate item from the dropdown menu in the Barcode box and Submit.

The statistics on in-house use are separated from circulation statistics. In-house use count of cataloged items is not included in the items' total use count.

## Due Dates

Circulation periods are pre-set. When items are checked out, due dates are automatically calculated and inserted into circulation records if the Due Date is set Normal on the Check Out screen. Different due dates may be set to override this circulation period.

This process will allow staff to set a non-standard loan period prior to scanning the item in Check Out.

1. Click Check Out button or hit **F1** to Retrieve Patron.
2. Scan the patron barcode.
3. Scan the item barcode
4. In the box labeled Normal, select a pre-set loan period from the list; OR Highlight Normal and type a specific date in YYYY-MM-DD format
5. The item is checked out with the special due date.
6. The special due date applies to all subsequent items until it is changed or the patron record is exited.

## Renewal and Editing an Item's Due Date

Checked-out items can be renewed according to library policy. The new due date is calculated from the renewal date. Existing loans may be extended to a specific date by editing the due date.

### Renewing items

1. Retrieve the patron record.
2. Items Out screen.
3. Select item(s) to renew.
4. Select Actions for Selected Items → Renew.
5. To renew all items in the account, click Renew All.
6. To view the new due date, click Refresh.

Renewal may also be done from the Items Status screen.

### Editing the due date of items

1. From the patron record, open Items Out tab
2. Highlight the item, *right click*, and select Edit Due Date
3. To update multiple items highlight the first item, press and hold **Ctrl**, highlight additional items
4. In the pop-up, enter the new due date.
5. Click OK.
6. Click Refresh to update the list.

Select multiple items by pressing down the **CTRL** key and clicking each item to edit.

Editing the due date does not affect renewal count.



## Item Check-In

- 1) To check items into the library and into Evergreen begin by accessing the Circulation menu and select Check-In Items.

2) Using your mouse, place the cursor in the light green “Enter Barcode” box and begin entering barcodes using your barcode scanner.

3) Items will begin to appear below as they are checked in.

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4) When checking in materials, it is **VERY IMPORTANT** to watch the screen as each barcode is scanned to be sure the scan is registering and to be aware of on-screen messages and directions.

1: mgrl-ma-demo-globaladmin@PIED-AUB-is1.demo.gapines.org

File Edit Search Circulation Cataloging Admin (?) Help

1 Item Check In

### Check In / Process Item

**Check In**

Enter Barcode:  Submit Effective Date: 2008-08-28 Actions for Selected Items

123456 is in transit.

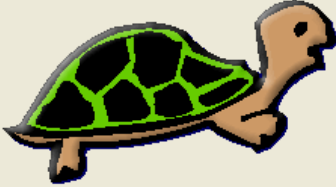
Alert Message	Author	Barcode	Call Number	Checkin Date	Location	Route To	Status	Title
	Rabbit, Peter	123456	12345		Stacks	STRL-RHILL	In transit	Went on a great adventure :
	Jim Jones	123456789	Not Cataloged		Stacks	MGRL-RC	In transit	NASCAR

Print List Export ☒ Trim List (20 rows) ☐ Strict Barcode ☐ Don't Alert on Pre-Cat ☐ Auto-Print for Hold/Transit Slips

5) If there is a hold requested for the item when it is checked in, the “Transit Slip” message will appear and a holds receipt will be automatically printed for this hold.

6) If patrons have selected in the OPAC to be notified by email when a hold is available, Evergreen Indiana will automatically dispatch an email to the patron letting them know their hold is available for pickup.

**Transit Slip**



Destination: STRL-RHILL.

Bryan County Library, Richmond Hill  
We do not have a holds address for this library.

Barcode: 123456  
Title: Went on a great adventure :  
Author: Rabbit, Peter

Hold for patron Smith, Jeremiah  
Barcode: 123456  
Notify by email:

Request Date: 2008-06-10  
Slip Date: 2008-08-28

**Options**

## Backdating Check-ins

1: sborger@ISLI-Shauna.evergreen.lib.in.us

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-) Help

1 Item Check In

**Backdated 2011-08-09 Check In**

Check In

Enter Barcode:  Submit

Effective Date: 9/ 2011 Actions for Selected Items

Alert Message	Balance Owed	Barcode	Bill #	Call Number	Checkin Date	Checkout or Renew Library	Family Name	Finish	Location	Owning Library	Route To	Start	Title
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List Actions Print List ☒ Trim List (20 rows) ☐ Strict Barcode Checkin Modifiers

- 1) To Backdate check-ins, change the date in the Effective Date screen to the date on which you would like the items checked in. You will notice that the Check-in screen changes to red and says Backdated. You must change the Effective Date back to the present in order to get back to the normal Check-in screen.
- 2) When checking in items from the book drop each morning, staff should set the Effective Date to reflect the previous day's date. Other dates may be selected if the library has been closed; however, the system will not accept a future date.

## Checking-in Items with Amnesty Mode

Checking-in with Amnesty Mode will forgive any fines that may have been applied to the items being checked-in. You can access Amnesty Mode by clicking on Checkin Modifiers at the bottom of the screen and choosing Amnesty Mode. Amnesty Mode will remain turned on until you manually turn it off. To turn it off, go to Checkin Modifiers and choose Amnesty Mode again.

The screenshot shows the 'Check In or Process Item' interface. At the top, a green banner contains the title and a red button for 'Amnesty Mode / Forgive Fines'. Below this, the 'Check In' section includes a barcode entry field and a 'Submit' button. To the right, the 'Effective Date' is set to 09/ 9/ 2011, and there is a link for 'Actions for Selected Items'. A large table with columns for item details is present, though it is currently empty. At the bottom, there are buttons for 'List Actions', 'Print List', checkboxes for 'Trim List (20 rows)' and 'Strict Barcode', and a 'Checkin Modifiers' button.

## Checking in pre-cataloged items

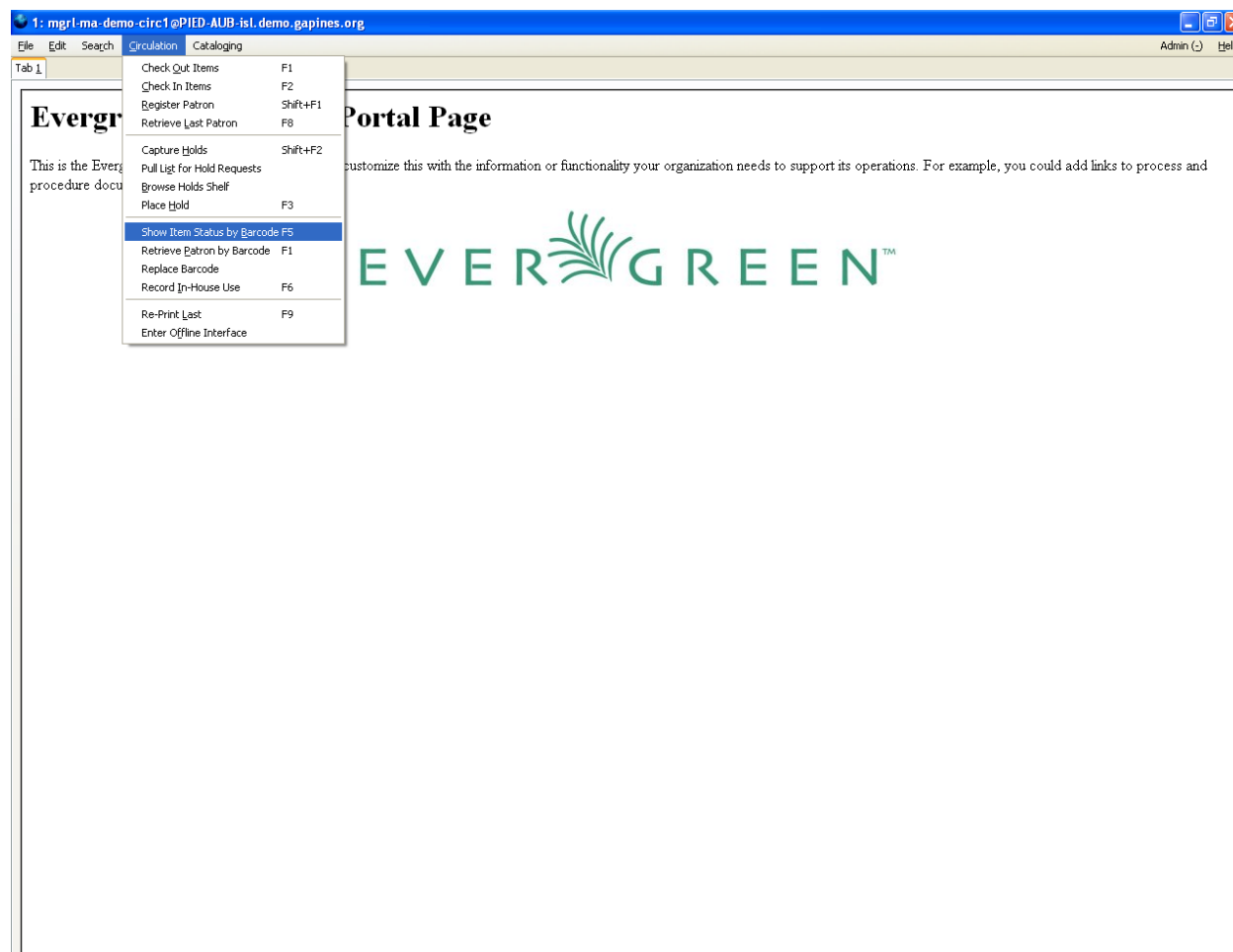
The item MUST be routed to your holdings maintenance staff to be added to the database before further check outs.

1. Scan the item barcode.
2. An alert will appear stating: "This item needs to be routed to Cataloging"
3. Click OK.
4. The item is added to the list of Check Ins, marked with: *[barcode number] needs to be cataloged, Route To location = Cataloging and Status = Cataloging*



## Viewing Recent Item Circulations

To view recent circulations for a particular item start by accessing the *Circulation Menu* and clicking *Show Item Status By Barcode*.



## Item Status

From the Item Status window scan or type the barcode of the item you wish to view circulation information on.

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1: mgrl-ma-demo-circ1@PIED-AUB-isl.demo.gapines.org

File Edit Search Circulation Cataloging Admin (-) Help

Item Status

### Item Status

**Scan Item**

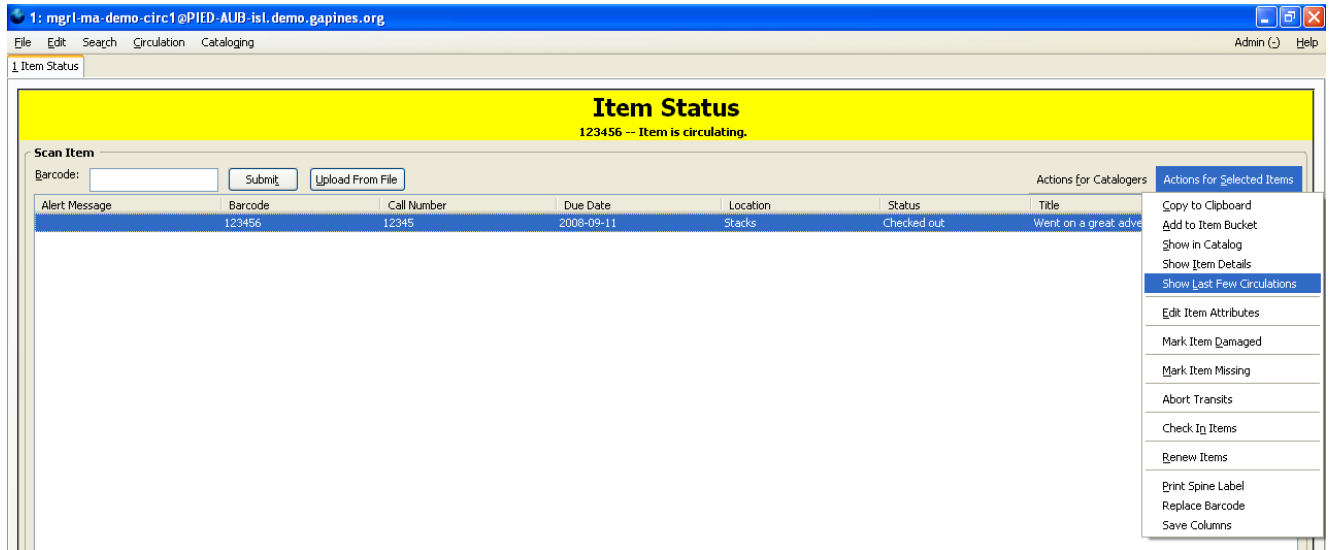
Barcode:  Submit Upload From File

Actions for Catalogers Actions for Selected Items

Alert Message	Barcode	Call Number	Due Date	Location	Status	Title	
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Print Export Print Export ☒ Trim List (20 rows) ☐ Strict Barcode

After entering the barcode, click on *Actions for Selected Items* and *Show Last Few Circulations*.



## Circulation History

The following screen will show the three most recent circulations for the item.

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Record Summary							
Title: Went on a great adventure :							
Author: Rabbit, Peter				Edition:		(View MARC)	
TCN: (AUTOGEN) 31		Created By: (MGRL-RO) mgrl-ro-demo-globaladmin		Last Edited By: (MGRL-RO) mgrl-ro-demo-globaladmin		Pub Date: 1982	
Last Edited On: 03/27/08							

Item Summary							
Alert Message	Barcode	Call Number	Circ Lib	Location	Owning Lib	Status	Total Circs
	123456	12345	MGRL-ID	Stacks	MGRL-ID	Checked out	3

[Alternate View](#)
[Save Columns](#)
[Copy to Clipboard](#)
[Print Export](#)

Last Few Circulations						
Smith, Jeremiah					Circ ID: 1392	<a href="#">Add Billing</a>
Check Out Time	2008-08-28 10:05	Due Date	2008-09-11	Stop Fines Time	Check In Time	
Check Out Lib	PIED-AUB	Renewal	No	Stop Fines Reason	Check In Lib	
Dintaman, Sonya					Circ ID: 604	<a href="#">Add Billing</a>
Check Out Time	2008-06-12 14:43	Due Date	2008-06-26	Stop Fines Time	2008-06-25 10:41	Check In Time
Check Out Lib	PIED-AUB	Renewal	No	Stop Fines Reason	CHECKIN	Check In Lib
						BROOK-HQ
Reynolds, Burt Darnelle : 1234567					Circ ID: 176	<a href="#">Add Billing</a>
Check Out Time	2008-03-27 16:02	Due Date	2008-04-10	Stop Fines Time	2008-05-12 03:50	Check In Time
Check Out Lib	MGRL-RO	Renewal	No	Stop Fines Reason	CHECKIN	Check In Lib
						MGRL-RC

[Retrieve Last Patron](#)
[Retrieve All These Patrons](#)

If the item was returned damaged, lost, etc., staff can retrieve the last patron to circulate the item and add a bill.

**Bill Patron Wizard**

**Smith, Jeremiah : 123456**

**Summary**

<b>Bill #</b>	1392	<b>Total Billed</b>		<b>Title</b>	Went on a great adventure :
<b>Type</b>	circulation	<b>Total Paid</b>		<b>Checked Out</b>	2008-08-28
<b>Start</b>	2008-08-28T10:05:49	<b>Balance Owed</b>		<b>Due Date</b>	2008-09-11
<b>Finish</b>		<b>Renewal?</b>		<b>Checked In</b>	

**Create Bill**

Location: Auburn Public Library

Transaction Type: Circulation

Billing Type: Damaged material

Amount: 16.54

Note: Book was left in the rain.